

Performance, Development and Review Policy

Adoption Arrangements

All statutory policies in the Trust are ultimately the responsibility of the Trust Board. To enable it to discharge this responsibility appropriately and in collaboration with the constituent schools, the Trust Board will:

1. set a full Trust wide policy,
2. set a 'policy principles' document (a framework within which headteachers develop a full and appropriately customised policy),
3. delegate to headteachers or Local Governing Boards (LGB) the power to develop their own policy.

This is a **level 1** policy which was approved for implementation in Tenax Schools Trust on the date below and supersedes any previous scheme.

Review Body:	Chief Executive Officer (CEO)
Date Approved:	11 November 2025
Author:	HR Director
Review period:	1 year
Next review due:	Autumn 2026

This policy has been adopted following consultation with recognized trade unions

1) Introduction

The Trust's 'appraisal' process is called the 'performance development and review' (PDR) process. This purposely shares the focus between how an employee is performing and how this performance impacts on pupils or their business function (as applicable), along with how they are developing professionally.

All Tenax employees need to know that their work makes a difference. Teachers and learning support staff need to know that their work supports pupils to progress and that the support and professional development they receive helps them to do their job better. Support staff in those roles that are not directly pupil facing, need to understand how their role facilitates excellence in delivery to the whole school and Trust community, through clarity of role and expectations, encouragement, development and feedback.

The PDR process enables professional discussion regarding workload and priorities and gives staff the appropriate focus, development and support. It provides staff with an opportunity to discuss, in confidence, any matters that may inhibit their performance at work.

2) Ethos

The vision of the Tenax Schools Trust is to achieve excellence by working together so that all may feel loved and liberated to serve a thriving society. We are committed to education providing life-changing, transformative opportunities to every child and young person in our schools.

We recognise the vital contribution made by every employee, to providing this transformative education. Our Trust is a place where everyone should be able to flourish in a loving and hospitable community, where all are treated with dignity and respect. Each employee, in all their unique difference should be able to thrive, irrespective of physical appearance, age, gender, race, religion, ethnicity, socio-economic background, academic ability, disability, sexual orientation, marital status, gender identity or other personal or social characteristics.

The individual identity of each school is valued equally, whether of faith designation or none.

3) Scope and purpose

This policy applies to all employees of Tenax Schools Trust, whether temporary or permanent, including the CEO, with the following exceptions:

- Teachers undergoing their formal induction, who receive their performance development and review support through the Early Career Teacher Entitlement
- Support staff who are in their probationary period
- Staff subject to the Trust's formal Capability Policy

PDR arrangements for temporary and part-time staff, apply on the same principles as for full-time, or permanent staff. The same degree of challenge in the process should apply but the breadth and volume of each element in the process should be proportionate to working time.

Teachers employed on a temporary contract of less than one year, will have their performance managed in accordance with the principles underpinning the provisions of this policy. The length of the cycle will be determined by the duration of their contract.

The purpose of this policy is to:

- Set out the principles and framework for a clear and consistent review of the overall performance of all staff and for supporting staff development needs within the context of the school/ Trust plan for improvement and their own professional goals.
- Ensure equality of opportunity; all staff should be encouraged and supported to flourish and achieve their potential through clarity of expectations and job role, regular feedback, performance development and review.
- Ensure our PDR process is consistent, fair and non-discriminatory.
- Provide the support needed for all our staff to deliver excellence, regardless of job role.
- Provide a mechanism to facilitate conversations and action about achieving, as far as possible, a satisfactory work/life balance.

For applicable staff, pay and rewards should reflect their overall contribution to the school/Trust both as individuals and as team members.

4) Policy Framework

4.1 The review cycle

The performance of all employees must be reviewed on an annual basis, with the review cycle running from 1st September to 31st August. A PDR must be completed by 31 October for all teachers and support staff, and by 31 December for the headteacher and trust executives.

Where an employee starts their employment part-way through an academic year, the length of the first performance and development review cycle will be such that it can be brought into line with the PDR process for the following academic year's cycle, with objectives proportionate to the time remaining in the current review period.

Where a member of staff transfers to a new post within the school part-way through a cycle, the headteacher/line manager shall decide whether to change the reviewer, and/or adjust the objectives

4.2 Responsibilities

Arrangements for PDR are a shared responsibility. The Board of Trustees has the strategic responsibility for establishing this policy. Trust leadership, and headteachers will ensure that this policy, associated regulations and guidance are communicated effectively and that staff with PDR responsibilities have access to appropriate

training and preparation. Employees have a responsibility to engage with the PDR process, preparing for and attending PDR meetings.

4.3 Appointing reviewers

Employees will normally have their PDR conducted by their line manager or senior manager. Headteacher performance will be reviewed by the CEO or a suitably experienced and qualified person appointed by the CEO, which may include the Director of Education.

The headteacher will determine the appropriate reviewer for all other staff covered by this policy taking due consideration of line management responsibilities and other relevant factors. Teachers' PDRs will be carried out by a reviewer with qualified teacher status.

If a member of staff has a concern about who has been allocated to complete their PDR, they should raise this with the headteacher, in writing, giving the reasons for the concern or objection. The headteacher will exercise careful consideration of the concerns and may allocate an alternative reviewer, seeking advice from HR as required.

The headteacher will ensure all reviewers receive appropriate training and preparation for their role.

4.4 The PDR Meeting – twice a year (Autumn 1 and Spring 1 or 2)

The reviewer will arrange a PDR meeting with the employee at the beginning of the performance review cycle. This should be arranged by mutual agreement and normally with at least five working days' notice. The reviewer must prepare for the meeting, making sure that all relevant information and evidence to be used during the meeting has been shared with the employee at the earliest possible opportunity.

All employees should have an up-to-date job description and this will form the basis for discussion at the PDR planning and review meeting. Employees should have access to the school improvement plan and other relevant planning documents in good time for their PDR meeting.

The PDR meeting should provide a two-way discussion to:

- Assess performance during the previous year against the employee's role and responsibilities, and any career stage expectations and/or relevant professional standards.
- Review progress against objectives set in the previous cycle.
- Agree expectations for the year ahead by reviewing the job description and setting appropriate performance objectives.
- Confirm timescales for achievement of the objectives and for provision of support, including development opportunities.

- Ensure the employee understands the key performance indicators, including any relevant pay progression criteria, relevant professional standards and any other appropriate evidence to be taken into account.
- Discuss and agree appropriate monitoring arrangements and other support for the reviewee, appropriate to the reviewee's role.
- Agree any areas of relevant training and development and related actions.
- Allow the reviewee to discuss any potential barriers to success including any concerns regarding their workload or work/life balance.

It is the reviewee's responsibility to play an active role in their review. This includes preparing for the meeting by:

- Reviewing the records of their objectives for the year and the mid-year review.
- Reflecting on their performance and development over the past year including their performance against the relevant professional standards/ or, for support staff, their role description.
- Considering how they have made a wider contribution to the school or Trust.
- Identifying some of their future development needs and aspirations.

4.5 Objectives

Professional development forms a key component of objectives for all staff, ensuring their professional practice remains up to date with the latest methodologies, technologies and research, as applicable. The Trust will identify resource and support to meet teachers' and support staff's professional development needs in line with school improvement or strategic priorities.

It is a core expectation that staff will fulfil the duties in their job description, or, for teachers, meet, at all times, the requirements set out in the Teachers' Standards. In addition, objectives will be set in each PDR cycle. Objectives should be challenging but achievable objectives, the term SMART (specific, measurable, achievable but challenging, relevant and time-framed). Where appropriate, the objective may have a "stretch" outcome set, to indicate performance that exceeds the expected outcome. Such opportunities can be motivating and link to the employee's career aspirations. Where a "stretch" outcome is set, employees will be considered to have met their target if the core objective is completed.

All employees (apart from leaders) will have three core objectives. These will be aligned with the school's improvement plan or the Trust strategic priorities, as cascaded through normal line management channels, driven by the Trust's purpose; to achieve excellence together: a transformative education for every child.

Employees holding a leadership role, should be set a further objective relating to their specific leadership responsibilities. For teachers, this will apply to those holding a Teaching and Learning Responsibility payment (TLR), and the objective will relate to outcomes of their area of leadership.

The first objective will be outcomes focused. For teachers, this will be a specific outcome measure or measures to be achieved, such as the progress of all pupils in their remit, or outcomes for groups of pupils, such as disadvantaged, pupils with SEND needs or higher achievers. The objective and outcome measures will be aligned to the expectations of a teacher's career stage. These are outlined in appendix [2] This will also be reflected in a role-appropriate way for support staff working in pupil-facing roles. For all other support staff, their first objective will be centred on a key outcome or outcomes for their functional area. Their line manager is responsible for ensuring this links to key operational or strategic priorities for their function.

The second objective will be a performance development target. For teachers, this will likely focus on the instructional coaching method of developing teaching practice and relate to the teacher's career-stage expectations. For pupil-facing support staff, this may include development of specialisms, such as behaviour or SEND, or developing their classroom knowledge and practice.

The third objective for all staff may be a further developmental or operational target, or could be related to wider project working, cross Trust participation, or development towards their next career stage. For Upper Pay Range teachers, this should be explicitly related to their "sustained and significant" contribution to wider school life.

It is always the intention that the reviewer and employee will seek to agree the objectives. However, where agreement cannot be reached the reviewer will determine the objectives and success criteria. In such cases, the employee can note their disagreement on the PDR record.

4.6 Evidencing performance

During the review period, each employee has a responsibility for gathering evidence of their progress throughout the year in order for them to identify any particular strengths or areas for further development at the mid-year and annual review meetings. This evidence may be compiled in any format, but should clearly relate to each of the objectives, and the relevant standards for their job role.

The reviewer should prepare their own evidence from a range of sources this evidence and make an assessment in the PDR record.

4.6a) Roles that are not pupil-facing

There is a huge breadth of administrative and premises support staff roles, so it is not possible to give an exhaustive list of evidence that may be used. Some examples of appropriate evidence of performance may include: improvements in department performance indicators or accuracy, cost savings they have made from improved contract management, or the time saved in improving departmental processes, or helpdesk logs. They may also draw on colleague or stakeholder feedback or survey data from pupils, parents or staff. Examples of evidence should be discussed between the reviewer and employee when objectives are set.

4.6 b) Teachers and pupil-facing support staff roles

For teachers and pupil-facing staff, appropriate evidence may include reviewing attainment and progress data, other relevant data, learning walks or observations (depending on school terminology/practice) book checks, contributions in team meetings and any other evidence that may be available.

In addition, a range of evidence should be available to the appraiser on a teacher's performance as part of the school's quality assurance processes. Evidence may include but is not limited to:

- (a) Direct observation of pupil learning (we recognise schools use varied terminology for this)
- (b) Planning, and work scrutiny / "book looks"
- (c) Questionnaires (pupil or parent – where obtained)
- (d) Pupil feedback (where obtained)
- (e) Tracking data of pupil's progress
- (f) Progress of individuals / groups
- (g) Evidence of meeting standards (Teachers and Career Stage)
- (h) Assessment of leadership responsibilities

4.7 Direct observation of pupil learning

Observations of pupil learning, for teachers, will be carried out by those with QTS and leadership responsibility and, for teaching assistants, by those with QTS or a HLTA.

The instructional coaching approach to teacher development requires teachers to participate in regular peer observation and feedback. Drop-ins linked to the instructional coaching programme provide evidence of engagement in the professional development programme but are not specifically linked to an assessment of performance.

Two further types of direct observation of pupil learning may take place.

- Learning walks - in schools this style of direct observation can be used to triangulate with other evidence of teacher's impact on pupil learning.
- Observations - in schools this style of planned direct observation can be used to triangulate with other evidence of adults' impact on learning.

Teachers and pupil facing support staff should receive timely feedback, which may be verbal or written, subject to the school's standard practice. Feedback should identify both strengths (so the reviewer can give positive feedback and praise) and areas for development.

4.8 Reviewing Performance and recording plans

All staff will be formally assessed in respect of each PDR period and receive a written record as soon as practicable; normally within ten working days following the PDR meeting. Employees may request changes if they feel the statement does not convey a fair summary of the meeting and/or may add written comments. The assessment of performance and of training needs will inform the planning process for the following PDR period.

The format for the PDR record is at Appendix 1

The reviewer may retain a copy of the PDR plan, but they must pass a copy to the reviewee and pass the original to the headteacher or, where appropriate, the CEO or other headteacher or CEO nominated person.

5. Performance Concerns

Where it appears that the employee is either not meeting or partially meeting the relevant professional standards then the PDR process must clearly set out the support and training that will be provided to address the areas of concern.

Should concerns about an individual's performance arise during the performance review cycle, or during the PDR meeting, except in the case of the most serious cases of under-performance, every effort will be made to resolve these informally.

The individual will be asked to attend a meeting with their reviewer or, where appropriate, a more senior manager. Although this is an informal meeting, it should be made clear that that employee is receiving informal support due to concerns about their performance. Requests to be accompanied by a workplace colleague or trade union representative will not normally be refused, unless making such arrangements would incur a delay of more than five working days.

During this meeting, the following will be discussed:

- The nature of, and evidence of, the performance concern/s.
- The performance standards required.
- Whether there are issues inside or outside of work that are affecting performance.
- The support that will be provided to address the specific concerns.
- A performance improvement plan with clear new objectives and the assessment period for these.

Following this meeting, the individual will be provided with a written performance improvement plan, confirming the details discussed.

Targets set within this discussion should be proportionate in number, reasonable in expectations, with clear success criteria and a focus on development. The timescale for improvements should reflect the seriousness of the concerns. Where a significant gap in performance is identified, a succession of incremental objectives may be agreed.

If, after a period of structured, informal support, performance has not met the Trust's expectations, the PDR cycle will be suspended, and the formal capability policy will apply. Where significant progress has been made, or it has not been possible to provide all the support measures agreed, a short extension to the informal review period may be agreed.

Where serious and sustained weaknesses are identified and evidenced in an employee's performance then this procedure will be suspended, and the issues will be managed within the Trust's formal Capability Policy.

Advice will be sought from Human Resources before moving from the PDR process into the formal capability procedure.

6) Exceptional Circumstances

Where the individual discloses a health or personal circumstance affecting their ability to meet their objectives, or contributing to poor performance, or where a disability is disclosed, the reviewer will consider requests for reasonable adjustments. Advice may be taken from the individual's medical practitioner, the Trust's Occupational Health Provider or Human Resources. More information is available in the Staff Wellbeing Toolkit.

Where the performance concern is due to a refusal to meet the school/Trust's expectations, this will be managed under the Trust's Discipline and Conduct Policy.

7) Professional Development

PDR is a developmental process and a key part of the planning discussion. It should be about the support that the employee will need to meet identified objectives and performance criteria.

Tenax Schools Trust is committed to ensuring that all staff have access to a level of development appropriate to their role, stage of career development, performance objectives and criteria and individual aspirations.

Development and training identified from the PDR process must be recorded using the appropriate form and then passed to the school or trust colleague responsible for arranging professional development to inform the school's programme for training and development.

The Trust recognises that development and support may take a number of forms and a wide range of activities which may not necessarily involve a formal course.

8) Monitoring

The line manager will ensure that appropriate arrangements are in place to support the employee with regular monitoring and feedback. This should be discussed in broad, flexible terms in the PDR meeting. There must be at least one formal mid-year PDR review meeting to discuss performance, provide feedback and discuss the provision of training and development. This should be scheduled to take place in February-March.

Line-managers should audit mid-year reviews with reviewers to ensure consistency of the PDR process.

9) Moderation

The headteacher is responsible for ensuring that the PDR process is applied fairly and consistently within each individual school and that there is a strong link with school improvement. The headteacher may therefore make appropriate arrangements for the moderation of PDRs and objectives in particular to ensure consistency of approach and expectations between reviewers. However, this exercise will be undertaken with due regard

for the need to maintain confidentiality. The Trust leadership group is responsible for PDR moderation within the Trust.

10) Changes to Plans Mid-Cycle

There may be times when it is necessary or appropriate to amend or change the content of the PDR plan. This may include changes in the reviewee's circumstances, school priorities or local/national policy initiatives. Should this happen, the reviewer and employee should discuss and ideally agree the changes.

Where agreement cannot be reached the reviewer will determine the objectives and success criteria, and the employee can note their disagreement on the PDR record.

11) Confidentiality and retention of records

The PDR process will be treated as confidential at all times, and in line with the Trust's data protection obligations. Full details can be found in the Trust's Data Protection and Records Management policies. Additional information about how information about our employees is collected and processed can be found in the Privacy notice – workforce.

For the headteacher's review the statement will be held by the CEO or designate.

12) Communication of this policy

A copy of this policy is available on the Trust website to ensure that all staff can have access to a copy of it as needed. All new staff joining the Trust will be briefed on the policy as part of their induction.

13) Legislation and Guidance

This policy should be read in conjunction with our other Trust policies including our:

Capability Policy
Induction of Early Career Teachers
Discipline and Conduct Policy
Staff Wellbeing Toolkit

These are available at <https://www.tenaxschoolstrust.co.uk/our-policies/>

Legislation relevant to this policy includes:

Employment Rights Act 1996
Equality Act 2010
Education School Teachers' Appraisal (England) Regulations 2012

Department for Education guidance documents including:

Teacher Appraisal and Managing Teachers' and Leaders' Pay
Teacher Standards

Performance and Development Review Record Academic Year XXXX-XXXX

Performance and Development Review must be linked to Trust expectations for career stage, PDR policy and pay policy. Where applicable, relevant Teacher Standards should be noted against each objective.

Employee name:	Confirmed payscale and point at start of 2025/26 year:	Other information (e.g. Teaching and Learning Responsibility, Upper Pay Scale, additional responsibilities):
		[E.g. Trust XX Lead]
Reviewer name:	Reviewer's line manager:	Year group/Class/Business unit

Objective setting Date	Mid-point review date	Final review meeting date
XXXX		

Targets and KPIs have been discussed and agreed

Signed (Employee) _____

Signed (Reviewer)_____

	Objective 1 (Outcomes – operational): [From key deliverables in job description. Link to departmental improvement targets] Key Actions: Support agreed:	
Key Area with success indicators	Mid-point Review	Final Review
Insert KPIs...	Evidence: <u>Strengths:</u> <u>Areas for Development:</u> You are currently on track / not on track to meet this target.	Evidence: <u>Strengths:</u> <u>Areas for Development:</u> You <u>have/ have not/ partially met</u> this target.
	Employee Comments	Employee Comments

	Objective 2 – Professional Growth and Development Key Actions: Support agreed:	
Key area with success indicators	Mid-point Review	Final Review
E.g impactful application of learning	Evidence: You are currently <u>not / partially / on track</u> to meet this target.	Evidence: You <u>have/ have not/ partially met</u> this target.
	Employee Comments:	Employee Comments:

	Objective 3 – [other relevant area for business unit, participation in wider projects etc]	
	Key Actions:	
	Support agreed:	
Key area with success indicators	Mid-point Review	Final Review
• Insert here...	Evidence: You are currently <u>not / partially / on track</u> to meet this target.	Evidence: You <u>have/ have not/ partially met</u> this target.
	Employee Comments:	Employee Comments:

	Objective 4 (Leadership roles only) – Impact of leadership [on Geography outcomes/overall financial position/HR practice]	
	Key Actions:	
	Support agreed:	
Key area with success indicators	Mid-point Review	Final Review
• Insert here...	Evidence: You are currently <u>not / partially / on track</u> to meet this target.	Evidence: You <u>have/ have not/ partially met</u> this target.
	Employee Comments:	Employee Comments:

Final review summary:

E.g. Targets met?

Professional development for future?

Career aspirations?

Pay recommendations and justifications- if appropriate

Signed/date employee:

Signed/date Line Manager:

TST Career Stage Expectations:

Link to teacher standards	Mainscale 1/2	Mainscale 3/4	Mainscale 5/6	Upper Payscale 1	Upper Payscale 2	Upper Payscale 3
Professional practice 1.1(1);1.2(2,3,5) 1.3 (1,3) 1.4(1,2,3) 1.5 all 1.6 (1) 1.7 (1,2,3) 1.8 (3) 2.1 (2,4)	Teacher professional knowledge is secure and beginning to be consistently applied in the classroom	Teacher demonstrates their professional understanding through effective classroom practice	Teacher is a highly competent practitioner and is beginning to make a sustained and substantial contribution to the school	Teacher is an exemplary practitioner. Practice is worthy of sharing of others. They make a sustained and substantial contribution to the school.	Teacher is an exemplary practitioner. Practice is worthy of sharing of others. They make a sustained and substantial contribution to the school.	Teacher is an exemplary practitioner. Practice is worthy of sharing of others. They make a sustained and substantial contribution to the school.
Professional outcomes 1.1(2) 1.2(1,2,3) 1.5(1) 1.6 (3,4)	Most pupils make progress in line with school expectations	Almost all pupils make progress in line with school expectations	Almost all pupils make progress in line with school expectations; some exceed them	Almost all pupils make expected progress. A group make more than expected progress	Almost all pupils make expected progress. A significant group make more than expected progress	Almost all pupils make expected progress. A significant group make more than expected progress
Professional relationships 1.1(1) 1.6(4) 1.7(4) 1.8(2,3,5) 2.1 (1,3,4)	Positive working relationships with pupils, colleagues and parents	These relationships are securely focussed on improving provision for pupils	Professional relationships with pupils, colleagues and staff lead to excellent class provision	Plays a proactive role in building key stage or departmental teams to improve provision and outcomes	Plays a proactive role in building key stage or departmental teams to improve provision and outcomes	Plays a proactive role in building school-wide teams to improve provision and outcomes
Professional development 1.2(4,5) 1.3(1,2,4,5) 1.4(5) 1.5(2,3,4) 1.6(1) 1.8(4) 2.1(2) 2.3	Full engagement with ECT programme; identifying key professional development needs and respond to advice and feedback	Takes a proactive role in accessing relevant support and professional development from colleagues	Fully competent practitioner able to keep up-to-date with changes and adapt practice accordingly	Plays a proactive role in leading the professional development of key stage or departmental colleagues	Plays a proactive role in leading the professional development of key stage or departmental colleagues	Plays a proactive role in leading the professional development of key stage or departmental colleagues

Annexe 1 Further Guidance for Teaching Staff

The model for PDR is based on an instructional coaching model. In this model, there is a focus on incremental improvements to a teacher's work, informed by evidence-informed research, professional development support, regular check ins and frequent feedback. These help teachers build habits that will help them to keep on getting better, at every stage of their career.

In practice, this looks like the cycle below:



Key to this cycle, is observation of teaching practice.

The trust encourages lesson 'drop-in' observation as part of the culture of professional development that informs effective instructional coaching. Such observations are "low stakes" and would normally be undertaken by a trained coach but may also be undertaken by school/trust leaders trained to help identify instructional coaching priorities for school/trust improvement.

Training for such observations will be undertaken by trust and school leaders using the guidance of the trust's chosen online platform provider to support instructional coaching.

The primary purpose of direct observation is to assist teaching and learning staff to develop their practice through reliable observation and prompt, constructive feedback specific to each lesson, thereby positively impacting on pupil progress and/or achievement. Drop-ins linked to instructional coaching programme provide evidence of engagement in the professional development programme but are not specifically linked to an assessment of performance.